

## Webinar Day 1: Overview of Agency COMMBUYS Readiness

June 2, 2104



# Goals for Today

- Define what we mean by agency “readiness” to use COMMBUYS
- Provide an overview of activities happening over the next 4 weeks
- Review available resources
- Explain next steps
- Answer your questions



# Readiness Defined

When we think of COMMBUYS readiness, we think of **PURCHASERS** (agency staff who buy goods from catalogs or conduct procurements) and **VENDORS** (businesses that provided needed goods and services to the Commonwealth.)

Being ready to use COMMBUYS means being ready to do business.



## Readiness for Purchasers

- Those on staff making simple catalog purchases (for example, ordering office supplies) are familiar with the ordering process, know how to search for items in catalogs, and have login access to COMMBUYS
- Those on staff needing to collect quotes prior to purchase understand the Open Market Requisition process and have login access to COMMBUYS
- The Organization Administrator has set up approval paths to ensure that requisitions are properly approved, converted to POs and sent to the vendor
- Procurement staff understand how to prepare and post a bid and can manage the lifecycle of the bid online

## Readiness for Purchasers – User Roles in COMMBUYS

It will be important for Organization Administrators to review role assignments to verify that staff have the roles they need to complete readiness activities and conduct business.

Inquiry

Dept. Access

Basic Purchaser



**Required for Contract  
Administrators to  
complete Departmental  
Contract enablement in  
COMMBUYS**

## Readiness for Vendors

- Departmental contract vendors are registered in COMMBUYS (this is a process the vendor needs to do for themselves at [www.COMMBUYS.com](http://www.COMMBUYS.com))
- Departmental contracts are active Master Blanket Purchase Orders in COMMBUYS (this means that contracts migrated from Comm-PASS have been activated as Master Blanket POs in COMMBUYS, or for contracts not in Comm-PASS, Master Blanket POs have been created in COMMBUYS). Agency contract administrators will need to complete this task.
- A catalog is associated with each Departmental contract or vendor. Agency contract administrators will need to complete this task.

# Readiness Defined

## What's Happened So Far

Launched COMMBUYS March 24, with a focus on Statewide Contract enablement

- Migrated statewide contracts to COMMBUYS
- Provided Organization Administrator, Purchasing and Procurement training to over 2,000 trainees in 70 agencies
- Published webcasts and job aids covering essential functions in COMMBUYS, and conducted a range of readiness activities, including COMMBUYS Liaison meetings, outreach meetings, and drop-in sessions for one-on-one support

## What Needs to Happen Next

- ✓ Deepen agency knowledge and proficiency in using COMMBUYS
- ✓ Ensure agency COMMBUYS set-up can support their business
- ✓ Enable Departmental contracts in COMMBUYS



# June Activities

## Week of 6/2

### Agency Intensive Readiness Program



Daily Orientation  
Webinars



Overview of Buying in  
COMMBUYS Open Session

### Ongoing Training

Purchasing from Catalogs



Conducting Procurements



Purchaser Drop-In Sessions



Vendor Training

## Week of 6/9

A&F EOEAA DOT EOHHS EOL

Secretariat Workshops



## Week of 6/16

EOPSS EDU HED

Agency Outreach Meetings



## Week of 6/23





# Agency Intensive Readiness Program

## Orientation Webinars

Day 1	Overview of the Readiness Process and Activities
Day 2	Department Contract Vendor Registration - Orientation to the vendor registration process
Day 3	Converting Department Contracts to Master Blanket Purchase Orders - Overview of the process to ensure Departmental contracts are set-up correctly in COMMBUYS and linked to vendors
Day 4	Orientation to the Catalog Enablement Process - Orientation to the catalog enablement process, including an explanation of catalog types, criteria to use in determining the right catalog type for each contract and/or vendor, and the steps in the catalog set-up process
Day 5	Topic Review and Next Steps

## Agency Intensive Readiness Program

# Secretariat Workshops

- Review key organization readiness concepts in more depth
  - ✓ Organization set-up
  - ✓ Vendors
  - ✓ Existing/converted contracts
  - ✓ Solicitation process
  - ✓ Catalog evaluation and decisions
  - ✓ Purchasing from contracts
- Review specific agency concerns and priorities (collected in advance of the session)
- Demonstrate functions real-time for the group (for example, contract to master blanket PO conversion in COMMBUYS)
- Discuss catalog decision-making – how to think through the process (agencies bring priority contracts for discussion)
- Conduct break-out sessions with functional groups based on concepts described above and agency need

**Dedicated outreach teams are assigned to work with each Secretariat and their component agencies.**

# Agency Intensive Readiness Program

## Secretariat Workshop

Secretariat workshops will be held in the COMMBUYS Training Room, One Congress Street, 11<sup>th</sup> floor, Boston.

<b>Administration &amp; Finance</b> (16 departments)	Monday, June 9 – 9 am – noon
<b>Education</b> (5 departments)	Monday, June 16 – 1-4 pm
<b>Energy &amp; Environmental Affairs</b> (8 departments)	Monday, June 9 – 1-4 pm
<b>Health &amp; Human Services</b> (15 departments)	Friday, June 13 – 9-noon
<b>Housing &amp; Economic Development</b> (10 departments)	Tuesday, June 17- 1-4 pm
<b>Labor &amp; Workforce Development</b> (7 departments)	Friday, June 13 – 1-4 pm
<b>Public Safety &amp; Security</b> (12 departments)	Monday, June 16 – 9-noon
<b>Transportation</b> (5 departments)	Wednesday, June 11 – 1-4 pm

Outreach team members will work with agencies to schedule follow-up meetings onsite at agency locations.

# Available Resources

## For Purchasers and Vendors

At [www.mass.gov/osd/commbuys](http://www.mass.gov/osd/commbuys), we have a number of resources available to both purchasers and vendors, including:

- job aids
- webcasts
- updated policy documents
- a glossary of terms and functional crosswalk

A key resource for agencies is the **Agency Readiness Workbook**, distributed to Liaisons and Organization Administrators and available online.

#### Webcasts

- [Overview of COMMBUYS](#)
- [Basic COMMBUYS Navigation](#)
- [Searching for Contracts in COMMBUYS](#)
- [Purchasing from Statewide Contracts in COMMBUYS](#)
- [Approving Documents in COMMBUYS](#)



#### Job Aids

- [COMMBUYS Requisitions](#)
- [COMMBUYS Purchase Orders](#)



**I Buy from Contracts**

#### Training Classes

- [Procurement in COMMBUYS: Creating Posting & Managing](#)



#### Webcasts

- [Overview of COMMBUYS](#)
- [Approving Documents in COMMBUYS](#)



#### Job Aids

- [COMMBUYS Bids](#)



**I Prepare Bids**



#### Training Classes

- [Organization Set-Up and Maintenance](#)



**I Administer My Organization**



#### Job Aids

- [How to Maintain Organizations in COMMBUYS](#)
- [How to Set Up Approval Paths](#)
- [How to Maintain Agency Users](#)
- [More topics..](#)



#### Webcasts

- [Overview of COMMBUYS](#)

# COMMBUYS Community Resource Map



**I'm a Vendor**



#### Jobs Aids

- [Vendor Registration](#)
- [Create a Quote](#)
- [Access Purchase Orders & Change Orders](#)

#### Training

- [Locate and Respond to Bids](#)



#### Webcasts

- [Overview of COMMBUYS](#)
- [Vendor Registration in COMMBUYS](#)
- [How to Find Bids and Submit Quotes in COMMBUYS](#)
- [How to Find Your Purchase Orders in COMMBUYS](#)

# Next Steps

## Think through the following:

- Your Departmental contracts and how you would prioritize them
- Your Departmental vendors and how you can reach out to them to get them to register (we'll talk more about this in Webinar 2, tomorrow)
- Who should attend your Secretariat workshop and what priority topics you would like to discuss
- What contracts to bring to your Secretariat workshop to work through the transition to COMMBUYS (you'll have more information about this after Webinars 3 and 4)
- Who might need to attend training or be assigned a role in COMMBUYS
- What assistance your Organization Administrator might need with ongoing set-up and approval paths

# Questions



## **We're here to help!**

**Questions?** You can reach the COMMBUYS Help Desk by phone (1-888-627-8283) and by email ([commbuys@state.ma.us](mailto:commbuys@state.ma.us)).

**More Information?** Visit [www.mass.gov/osd/commbuys](http://www.mass.gov/osd/commbuys) for training information, webcasts, job aids and other resources.